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PAGE 01 STATE 300498

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SUBJECT: U.S.-JAPAN STEEL CONSULTATIONS, DECEMBER 6-7

1. BEGIN SUMMARY. IN TWO-DAY MEETING, USG AND GOJ DISCUSSED
CURRENT AND PROJECTED STEEL SITUATION, THE EC-JAPAN UNDERSTANDING
ON STEEL, THE 301 CASE ON STEEL AND POSSIBILITIES FOR MTN
STEEL SECTOR DISCUSSION. USDEL ACQUIRED SUBSTANTIAL AMOUNT
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PAGE 02 STATE 300498

OF INFORMATION ON JAPANESE DOMESTIC AND EXPORT SITUATION AND
EXPRESSED ITS CONCERNS IN LIGHT OF CURRENT U.S. SITUATION AND
PROSPECTS. AFTER CONSIDERABLE EFFORT, USDEL ACQUIRED
DESCRIPTION OF JAPAN-EC UNDERSTANDING, SIMILAR BUT NOT IDENTICAL

TO EC'S DESCRIPTION. JAPANESE DEL EXPRESSED DOUBTS ABOUT BASIS FOR 301 ACTION REGARDING THE UNDERSTANDING AND ALSO REITERATED BELIEF THAT SPECIALTY STEEL QUOTAS ARE NOT WARRANTED. IN DISCUSSION OF SECTOR NEGOTIATION, JAPANESE DEL QUESTIONED NEED FOR AND PURPOSE OF STEEL SECTOR APPROACH BUT FOUND COMMON INTEREST IN LIBERALIZATION, COMPLEMENTARY USE OF SECTOR APPROACH, AND NEED TO FURTHER DISCUSS AND ANALYZE STEEL SECTOR. END SUMMARY.

2. DISCUSSIONS BEGAN WITH AN EXCHANGE OF INFORMATION ON CURRENT DOMESTIC STEEL CONDITIONS. USDEL REVIEWED U.S. MARKET AND INDUSTRY SITUATION, POINTING OUT RECENT DIFFICULTIES. JALANESE DEL ASKED SEVERAL QUESTIONS ABOUT STEEL PRICE INCREASES AND MARKET PROSPECTS.

3. ISHII (MITI, DIRECTOR IRON AND STEEL ADMINISTRATION DIVISION) REVIEWED LARGE PRODUCTION DECREASE IN JAPAN FROM 1973 (4Q) LEVEL OF 31.7 MILLION TONS TO 24.1 MILLION TONS IN 1975 (4Q), A 23 PERCENT DROP. BY 1976 (3Q) PRODUCTION RECOVERED TO 27.9 MILLION, AN OPERATING RATE OF 74 PERCENT. PRODUCTION IS EXPECTED TO REACH 28.5 MILLION TONS IN 1976 (4Q) BUT FALL IN 1977 (1Q) TO 27 MILLION TONS. THE PRINCIPAL CAUSE IN THE DECLINE FROM PRODUCTION PEAK WAS A DROP IN PRIVATE DOMESTIC INVESTMENT DEMAND (FROM 32 MILLION TONS IN 1973 TO 19 MILLION TONS IN 1975). AUTO EXPORTS AND DOMESTIC CONSUMER DURABLES DEMAND HAVE CONTRIBUTED MOST TO RECOVERY. ISHII ESTIMATES THAT 12 MILLION TONS OF JAPANESE STEEL IS EXPORTED IN THE FORM OF SHIPS, CARS AND OTHER PRODUCTS (20-25 PERCENT OF JAPAN'S DOMESTIC STEEL CONSUMPTION).

4. USDEL INQUIRED ABOUT IMPACT OF SHIPBUILDING CUTBACKS ON JAPANESE STEEL, PARTICULARLY PLATE. ISHII INDICATED 40 PERCENT OF JAPANESE PLATE GOES INTO SHIPBUILDING BUT THAT THERE IS NO REAL PROBLEM IN CURRENT FISCAL YEAR. HOWEVER, IN LAST HALF OF FISCAL 1977 THERE WILL BE A GREAT DIP AND MITI IS STUDYING WAYS OF DEALING WITH THIS PROBLEM.
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PAGE 03 STATE 300498

5. USDEL ASKED ABOUT CAPACITY FORECASTS FOR NEXT SEVERAL YEARS. ISHII SAID CURRENT CONSTRUCTION PROGRAM LAUNCHED IN 1973 (5 BLAST FURNACES) WOULD BE WRAPPED UP IN 1977 AND WOULD ADD 20 MILLION TONS TO EXISTING CRUDE STEEL CAPACITY OF 130 MILLION TONS. AFTER THAT THERE WOULD BE LITTLE ADDED. HE INDICATED THAT MATERIALS SUPPLIES WERE THE PRINCIPAL CONSTRAINT ON FURTHER INCREASES. THE MAXIMUM PRODUCTION ACHIEVABLE WITHOUT DISRUPTING MATERIALS MARKETS TOO SEVERELY IS 130-135 MILLION TONS. COAL, MOST OF WHICH COMES FROM U.S., IS THE MAJOR CONSTRAINT. LONG-TERM CONTRACTS (15-20 YEARS) MAKE AVAILABILITY OF IRON ORE LESS A PROBLEM BUT JAPANESE EXPERIENCE WITH

COKING COAL DURING PEAK DEMAND OF 1973 HAD BEEN RUDE AWAKENING AND JAPANESE HAD "LEARNED THEIR LESSON". ISHII REFUSED TO SPECULATE WHAT JAPANESE STEEL PRODUCTION MIGHT BE IN ABSENCE OF THIS CONSTRAINT. WITH RESPECT TO CURRENT LARGE CAPACITY ADDITIONS, ISHII LIKENED STEEL TO THE TANKER PROBLEM WHERE JAPANESE PRODUCERS HAD OVERESTIMATED NEEDS AND NOW FOUND IT DIFFICULT TO CHANGE DIRECTION.

6. USDEL ASKED ABOUT CURRENT EXCESS CAPACITY PROBLEMS GIVEN FY 1976 PRODUCTION OF ONLY 109 MILLION TONS COMPARED WITH OPERATING CAPACITY OF 130 MILLION TONS AND THEORETICAL CAPACITY OF 152 MILLION TONS. WITH RESPECT TO LARGE EXCESS CAPACITY IN ELECTRIC FURNACES, MITI IS NOW STUDYING THE SITUATION AND WOULD LIKE TO ELIMINATE SUCH CAPACITY. BLAST FURNACE OPERATING CAPACITY IS BEING REDUCED BY CLOSING SOME SMALL FURNACES. JAPAN IS EXPERIENCING SAME PROBLEMS AS EC AND U.S. IN AN EXCESS OF MILL PRODUCTS FOR THE INVESTMENT SECTOR (E.G. BAR, SHAPES) AND ALSO HAS SAME PROBLEMS IN PLATE.

7. ISHII GAVE HIS PERSONAL FORECAST THAT STEEL PRODUCTION WOULD REACH 135-138 MILLION TONS IN 1980, CONSIDERABLY LESS THAN GOJ OFFICIAL FORECAST OF 151 MILLION TONS. IN EITHER CASE, EXPORTS ARE ASSUMED TO BE STABLE AT 1976 LEVEL SO THAT DOMESTIC DEMAND WOULD HAVE TO ACCOUNT FOR ANY INCREASE. COMMENT: WHEN PRESSED ON REALISM OF SUCH FORECASTS IN LIGHT OF STAGNANT INVESTMENT DEMAND AND EXPECTED DECLINE IN SHIPBUILDING, ISHII BECAME QUITE LIMITED OFFICIAL USE
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PAGE 04 STATE 300498

VAGUE. HE ALSO HEDGED ON A STABLE EXPORT FORECAST, INDICATING THAT EXPORTS COULD CHANGE AS FOREIGN DEMAND CHANGES. END COMMENT.

8. USDEL RECOUNTED REPORTS ABOUT POOR PROFIT PERFORMANCE OF BIG SIX JAPANESE STEEL PRODUCERS AND ASKED HOW LARGE SCALE INVESTMENTS COULD BE MAINTAINED. ISHII SAID FIVE OF THE SIX ARE IN THE RED BUT THERE HAS BEEN SOME IMPROVEMENT AS A RESULT OF 30 DOLS/TON PRICE INCREASES IMPLEMENTED IN JUNE 1976. BY MARCH 1977 HE PREDICTED THEY WOULD AGAIN BE IN THE BLACK BUT THAT PROBLEMS MIGHT ARISE AGAIN IN LATE 1977 DUE TO PROGRAMMED MATERIALS PRICE INCREASES IN LONG-TERM CONTRACTS. HE EXPLAINED CONTINUED HIGH INVESTMENT LEVELS AS A MATTER OF JAPANESE MANAGEMENT POLICY, WHICH DIFFERS FROM U.S. MANAGEMENT POLICY, INDICATING DEFICITS COULD BE MAINTAINED IN THE PASE DUE TO HIGH ECONOMIC GROWTH ROLES.

9. ISHII REPORTED JAPAN'S STEEL EXPORTS FOR JANUARY-OCTOBER 1976 AS 30.89 MILLION TONS, 27.8 PERCENT ABOVE THE SAME 1975 PERIOD. YEAR TO YEAR CHANGES FOR MAJOR PRODUCTS

IN PERCENTAGE TERMS WERE PLATE (MINUS 6.7 PERCENT) COLD ROLLED SHEET (PLUS 71.1 PERCENT), GALVANIZED STEEL (PLUS 93.6 PERCENT) AND STRUCTURAL SHAPES (PLUS 68.7 PERCENT). BY AREA THE LARGEST INCREASE WAS TO NORTH AMERICA (PLUS 46.6 PERCENT) FOLLOWED BY ASIA (33.3 PERCENT), THE MIDDLE EAST (26.2 PERCENT) AND EUROPE (24.2 PERCENT), DESPITE OVERALL GAIN TO EUROPE, EXPORTS TO THE EC WERE DOWN 16.6 PERCENT FROM 1.51 MILLION TONS TO 1.26 MILLION TONS. EXPORTS TO THE U.S. WERE UP 45.6 PERCENT FROM 4.25 MILLION TONS TO 6.24 MILLION TONS.

10. IT WAS ESTIMATED BY ISHII THAT JAPAN'S EXPORTS TO THE U.S. WOULD BE 1.52 MILLION TONS IN THE 4Q OF 1976 COMPARED WITH 1.96 MILLION TONS IN 3Q OF 1976. 1977 1Q EXPORTS WOULD DECLINE FURTHER. HE INDICATED THE U.S. DEMAND DECLINE IN SUMMER OF 1976 WAS ALREADY SHOWING UP IN JAPANESE EXPORTS (OCT. EXPORTS OF 590,000 TONS WERE BACK AT APRIL LEVEL). GLOBAL EXPORTS WERE ESTIMATED AT 8.0 MILLION TONS IN 4Q OF 1976 AND SMALLER IN 1Q OF 1977. EXPORTS FOR FY 1977 WOULD BE DEVELOPED NEXT APRIL.
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PAGE 05 STATE 300498

11. USDEL RAISED PROBLEM OF PARTICULAR PRODUCT/REGION DIFFICULTIES BEING REPORTED IN U.S. TRADE (E.G. GULF COAST STRUCTURALS AND PLATE, WEST COAST STRUCTURALS). ISHII RESPONDED WITH RESPECT TO GULF COAST PROBLEM THAT THE JAPANESE INDUSTRY HAD SUSPENDED ITS OPERATIONS PENDING THE OUTCOME OF THE CONSULTATION AND IF USG PROVIDED MORE DETAILS IT COULD BE MORE RESPONSIVE TO DEMAND CONDITIONS. USDEL INDICATED IT COULD PROVIDE WHATEVER INFORMATION IT HAD AVAILABLE BUT MERELY HAD INTENDED TO PROVIDE EXAMPLES OF PROBLEMS BEING EXPERIENCED.

12. USDEL REVIEWED WHAT HAD BEEN LEARNED ABOUT SIMONET PLAN IN US/EC DISCUSSION AND ITS CONCERNS WITH RESPECT TO THE PLAN (AS IN REF A). WOLFF OUTLINED SIMONET PLAN, POINTING OUT ASPECTS WHICH COULD BE OF INCREASING CONCERN TO EC'S TRADING PARTNERS. THESE INCLUDE THE CRISIS PLAN WHICH TENDS TO MAINTAIN AN INEFFICIENT INDUSTRY AND WHICH COULD LEAD TO INCREASING PRESSURES FOR PROTECTION FROM IMPORTS. THE METHOD OF SETTING PRODUCTION QUOTAS BY COMPANY WITHOUT REGARD TO EXPORTS COULD ENCOURAGE PRODUCTION FOR EXPORT AND DUMPING IN THIRD MARKETS, PARTICULARLY THE U.S. IF EC CRISIS MEASURES LEAD TO SUCH TRADE DISTORTING PRACTICES, THERE WOULD LIKELY BE INCREASING PRESSURES IN THE U.S. AND IN OTHER COUNTRIES FOR SIMILAR MEASURES. JAPANESE DEL WAS ASKED FOR ITS REACTION. ISHII SUGGESTED MAIN GOJ CONCERN WOULD BE WITH AUTOMATICITY OF CRISIS MEASURES AND ACTIONS AGAINST IMPORTS. HE INDICATED HE DOUBTED EC WOULD EXPAND EXPORTS BECAUSE OF WHAT HAS HAPPENED TO ITS EXPORTS DURING LAST 18 MONTHS.

GOJ WILL HAVE TO STUDY PLAN FURTHER.

13. USDEL ASKED WHY EXPORT PRICES HAD NOT BEEN RISING DUE TO STRONG PERFORMANCE OF JAPANESE EXPORTS. ISHII INDICATED THERE HAD BEEN SOME INCREASE FROM FEB 76 LEVEL OF 260 DOLS/TON TO CURRENT 310 DOLS/TON LEVEL AND THAT EXPORTERS WANT TO INCREASE MORE. HE SAID THAT EXPORTERS HAD TO FOLLOW INTERNATIONAL PRICES AND MARKET CONDITIONS IN PARTICULAR COUNTRIES.

14. SAITO (MOFA DIRECTOR, SECOND NORTH AMERICA DIV)
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PAGE 06 STATE 300498

REITERATED GOJ BELIEF THAT SPECIALTY STEEL QUOTAS ARE NOT WARRANTED. HE STRESSED GOJ CONCERN THAT BEARING STEEL BE REMOVED AS SOON AS POSSIBLE. WOLFF REPLIED THAT DEVELOPMENTS IN THIS AREA ARE DIFFICULT TO PREDICT DUE TO TRANSITION (BUT THAT RECOVERY OF THE INDUSTRY HAD BEEN SLOW AND THERE ARE STILL PROBLEMS). SAITO ALSO EXPRESSED GOJ CONCERN ABOUT THE PENDING 337 CASE BUT DID NOT WANT TO DISCUSS ANY DETAILS.

15. USDEL ASKED ABOUT SCOPE AND UNDERSTANDING OF EC-JAPAN STEEL UNDERSTANDING AND OBTAINED FOLLOWING DETAILS THROUGH INTENSIVE QUESTIONING OF JAPANESE DEL:

(A) GOJ HAS GIVEN NOTICE THAT IF THE BIG SIX APPLIED FOR A CARTEL FOR 1977, IT WOULD BE APPROVED AND THAT 1.22 MILLION TONS WAS THE FIGURE ACKNOWLEDGED BY BOTH SIDES ON EXPORT LEVELS.

(B) EC AND GOJ AGREED ON THE PROSPECT THAT STRUCTURAL SHAPE EXPORTS WOULD DECLINE FROM 1976 LEVEL OF ABOUT 250,000 TONS TO ABOUT 130,000 TONS IN 1977 DUE TO WEAK MARKET CONDITIONS IN EC AND UNUSUAL SPECULATIVE PURCHASES BY EC MANUFACTURERS IN 1976 THAT WILL NOT BE REPEATED IN 1977. (NOTE: ISHII STATED THAT EC STEEL PRODUCERS AND DISTRIBUTORS HAD AGREED TO BOYCOTT JAPANESE SHAPES UNTIL MARCH 1977).

(C) EC MENTIONED PROBLEM OF BAR IMPORTS AND GOJ INDICATED EC PROBLEM WAS WITH SPAIN AND EASTERN EUROPE, NOT JAPAN.

(D) GOJ GAVE EC FORECASTS OF EXPORTS TO THE UK SHOWING NO INCREASE IN ALLOY TOOL STEEL IN 1977 AND A DECLINE IN STAINLESS STEEL BAR IN THE FIRST HALF OF 1977 COMPARED WITH THE SAME 1976 PERIOD.

(E) GOJ DID NOT PROVIDE EC WITH OVERALL STEEL EXPORT FORECAST. (NOTE: ISHII INDICATED DROP WOULD BE LESS THAN 15 PERCENT IN 1977 AND VOLUME WOULD EXCEED 1,275,000 TONS.)

(F) GOJ INDICATED IT WILL ADJUST EXPORTS TO SWITZERLAND (PRINCIPALLY SHEET AND PLATE) IN ORDER TO MAINTAIN EFFECTIVENESS OF BIG SIX CARTEL. (NOTE: ISHII INDICATED THAT PROBLEM WAS WITH EC DISTRIBUTORS OPERATING IN SWITZERLAND AND TRANSSHIPPING INTO EC. STEPS TO BE TAKEN

BY CARTEL TO CHANGE SITUATION ARE NOT YET DETERMINED).
(G) EC EXPRESSED NO OBJECTION TO PRICING BY BIG SIX BUT
DID COMPLAIN ABOUT SHAPE PRICES; HOWEVER, GOJ GAVE NO
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PAGE 07 STATE 300498

ASSURANCES. COMMENT: PRINCIPAL DIFFERENCES AS COMPARED
WITH EC VERSION RELATE TO ASSURANCES ON PRICES (EC SAID
THEY WERE GIVEN); BAR AND ROD EXPORTS (EC SAID TOTAL
COULD NOT INCREASE); AND OVERALL EFFECT (EC SAID GOJ
INDICATED OVERALL 15 PERCENT DROP IN EXPORTS TO EC). EC
ALSO IMPLIED INDUSTRIES WOULD MEET TO WORK OUT DETAILS
OF CARTEL ACTIVITY BUT GOJ INDICATED NO KNOWLEDGE OF SUCH
MEETINGS. END COMMENT.

16. ISHII AGREED THAT THREE BIG QUESTIONS IN PENDING AISI
301 CASE ARE WHETHER AN AGREEMENT BETWEEN EC AND JAPAN
EXISTS, WHETHER MITI GAVE ADMINISTRATIVE GUIDANCE TO
INDUSTRY, AND WHETHER THERE WAS DIVERSION. HE ASKED ABOUT
TIMING AND PROCEDURES. WOLFF RESPONDED THAT TIMING WAS
OPEN AND THAT REVIEW WOULD BE CONDUCTED IN NEAR FUTURE.
HE ARGUED THAT GOJ TOLERANCE OF A CARTEL MIGHT BE A
SUFFICIENT BASIS TO SUPPORT A SECTION 301 CASE WHETHER
OR NOT AGREEMENT EXISTS OR GUIDANCE WAS PROVIDED.

17. ISHII SAID GOJ IS NOW STUDYING CASE BUT SAID GOJ
THOUGHT THERE HAD BEEN NO DIVERSIONS ON FOLLOWING BASIS:
(A) EXPORTS OF BIG SIX TO EC WOULD BE ONLY 1 MILLION TONS
IN 1976, BELOW 1.22 MILLION TON LEVEL SET FOR CARTEL AND
1.29 MILLION TON LEVEL IN 1975, INDICATING WEAK EC MARKET
CONDITIONS;
(B) WHILE TOTAL EXPORTS TO EC WERE DOWN FOR JAN-OCT 1976,
EXPORTS TO EUROPE INCREASED BY 50 PERCENT SO THAT ANY
DIVERSION WAS CONTAINED WITHIN EUROPE NOT TO U.S. MARKET.
USDEL ASKED HOW GOJ WOULD ARGUE THAT PRESSURES TO EXPORT
AS A RESULT OF EC RESTRAINTS COULD BE CONTAINED WITHIN
EUROPE, BUT JAPANESE DEL COULD NOT PROVIDE RESPONSE OTHER
THAN THAT EXPORTS TO U.S. WERE RESPONDING TO INCREASED
DEMAND IN U.S. MARKET.

18. USDEL ASKED FOR DATA ON EC EXPORTS FOR RECENT YEARS
TO U.S., EC AND OTHER EUROPEAN COUNTRIES AND EXPORTS BY
THE BIG SIX TO U.S. MARKET.

19. USDEL REVIEWED ALTERNATIVE FUTURE STEPS UNDER
CONSIDERATION BY USG INCLUDING MORE FREQUENT BILATERAL
DISCUSSION, TRILATERAL OR PLURILATERAL DISCUSSION, OR
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PAGE 08 STATE 300498

TAKING UP ISSUES IN GATT. WITH RESPECT TO SECTOR NEGOTIATIONS USDEL OUTLINED PLANNED SCENARIO FOR PROCEEDING AND MAJOR ISSUES NOW BEING EXAMINED BY USG INTER-AGENCY GROUP. JAPANESE DEL RAISED NUMEROUS QUESTIONS ON WHY STEEL SHOULD BE TREATED DIFFERENTLY IN MTN. USDEL DESCRIBED VARIETY OF FACTORS THAT SET STEEL APART (E.G. GOVERNMENT INVOLVEMENT, PROTECTIONIST ACTIONS DURING RECESSION) BUT POINTED OUT POSSIBILITY OF DEALING WITH SOME ASPECTS IN GENERAL APPROACHES. JAPANESE DEL EXPRESSED CONCERN THAT EXCESSIVE USE OF SECTOR APPROACH WOULD REDUCE LIBERALIZATION AND ASKED WHY EXISTING GATT SYSTEM IS INADEQUATE. USDEL INDICATED COMMON CONCERN FOR TOO MANY SECTOR DISCUSSIONS. WOLFF SUGGESTED THAT RECENT RESTRICTIVE ACTIONS BY OTHERS FALL OUTSIDE GATT AND THAT MANY MEASURES WHICH MAY DISTORT TRADE STILL EXIST DESPITE GATT. HE PRESCRIBED NATIONAL SELF-HELP AS THE RULE IN STEEL MATTERS, WITHOUT RULES OR LIMITS ON ACTIONS THAT CAN BE TAKEN.

20. ISHII ARGUED THAT THERE ARE NO CYCLICAL DISTORTIONS TO STEEL TRADE IN JAPAN OR ELSEWHERE, DESPITE DIFFERENCES IN GOVERNMENT INVOLVEMENT AND EMPLOYMENT PRACTICES. WHEN U.S. HAD VRA'S, U.S. STEEL INDUSTRY PROFIT FROM 1970-72 STILL DECLINED AND INCREASES IN IMPORTS MAINLY HAVE RESULTED WHEN U.S. EXPERIENCES LABOR PROBLEMS. DURING RECESSIONS, HE SAID IMPORTS DECLINE. HE CONCLUDED THAT IF THERE WERE CYCLICAL DISTORTIONS, THEY DON'T REQUIRE MULTILATERAL DISCUSSION BUT CAN BE HANDLED AMONG THE MAJOR COUNTRIES. WOLFF RESPONDED BY QUESTIONING ISHII ASSUMPTIONS THAT USG CONSIDERS JAPAN TO BE THE PROBLEM AND MENTIONED RECENT EC DEVELOPMENTS AS OF GREATER CONCERN.

21. MATSUDA (MOFA) SUMMED UP DISCUSSION BY IDENTIFYING SEVERAL ASPECTS OF SECTOR APPROACH TO WHICH JAPANESE DEL COULD AGREE, INCLUDING (A) EMPHASIS ON LIBERALIZATION; (B) COMPLEMENTARY NATURE OF SECTOR APPROACH, AND (C) FAVORABLE DISPOSITION TOWARD FURTHER DISCUSSION AND ANALYSIS OF STEEL SECTOR SITUATION. HODGSON UNQUOTE ROBINSON

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